Advanced Filters – NEOGOV E-recruit Training for HR Users

Overview

Advanced Filters give you the ability to search for candidates based on criteria designed by you or other members of your HR team. Advanced Filters are divided into two major categories: Evaluation Step Filters and Eligible List Filters.

Evaluation Step Filters

Evaluation Step Filters are those filters you use to search for candidates while they are within your Exam Plan's Evaluation Steps. These filters can be as simple or complex as you need and can span across multiple search elements.

Search elements for Evaluation Step Filters include:
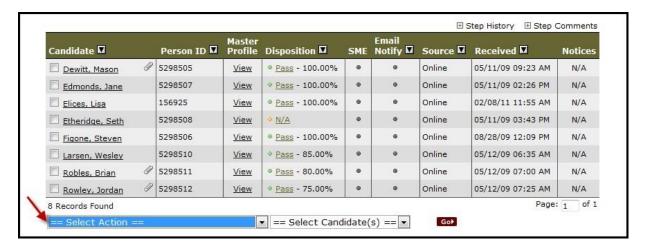
- Applicant Master Profile
- Application
- Agency-Wide (standard) Questions
- Supplemental Questions (specific to a posting)
- Applicant Step

Add and Apply an Evaluation Step Filter

You have two paths to add an Evaluation Step Filter: from the View Applicants by Step page (while you're working with the candidate records), or from the Exam Plan Detail page (the main page for your Exam Plan record). Both paths lead to the final outcome of creating a new Evaluation Step Filter.

When you create an Evaluation Step filter from the View Applicants by Step page, you're likely "in the zone," in the midst of working with the candidate records and need to perform some type of search function.

- From the Exam Plan Detail page, click View Applicants by Step and expand an Evaluation Step that contains application records that require some type of filtering.

- From the Select Action drop-down field, select Advanced Filter.

- From the Select Candidate(s) drop-down field, select the applicable candidate value base you will filter upon (e.g., all).

- Click "Go".

- Click Add Filter.

- Input a descriptive name into the Name field.

- In training, and initially, in production, you will not wish to share your filter.

- Input your first search criteria in the condition line:

- For Object (*the area you pull the filter from*), select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions.

- For Field *(the question(s) you are using as a filter)*, select the field on which you're basing your search condition.

- For Operator, select the function that yield the records that you're expecting to see. ○ Quick tips: For exact matches, select Equal. For less exact matches, use the Contains operator (e.g., the Work Type field contains Full Time and/or Part Time values). For more advanced searching, the Field operator can be used to match or contrast the value in one field with the value in a different field.

- For Value *(the answer(s)/attributes you are filtering on)*, input the field value for which you're basing your search.

- If your filter only contains one search condition, you're free to click save; however, if you would like to refine your search, add additional condition lines by click "Add Condition".
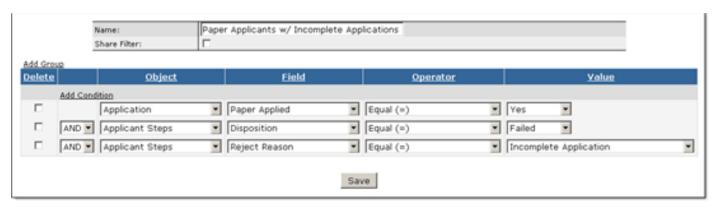

- Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.

- If your filter is advanced and requires combining AND'd and OR'd condition lines, then click Add Group.

- Once you have completed your entire filter statement, click Save.

- Upon saving you are returned back to the page allowing you to apply, or execute your Evaluation Step filter; click Apply.

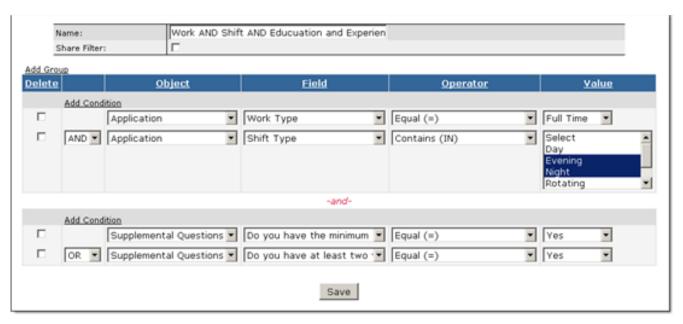- Your Evaluation Step will display, THIS STEP IS FILTERED.

- After your application records are filtered, you're free to carry on with other tasks, e.g., change Disposition values, send notices, etc.

Below are a few filter examples to give you a better understanding of how to construct your own filter statements.

Filter Example 1 - Applicants who have submitted incomplete paper applications for employment.

Delete		Object	Field	Operator	Value
Name:		Paper Applicants w/ Incomplete Applications			
Share Filter:		☐			

Add Group

Delete		Object	Field	Operator	Value
Add Condition					
☐		Application	Paper Applied	Equal (=)	Yes
☐	AND	Applicant Steps	Disposition	Equal (=)	Failed
☐	AND	Applicant Steps	Reject Reason	Equal (=)	Incomplete Application

Save

Filter Example 2 - Applicants who have selected they are willing to work full time during evenings, and/or, nights. Also, they have either a Bachelor's degree in Computer Science, or, at least two years of experience as a Database Administrator.

Name:		Work AND Shift AND Educuation and Experien			
Share Filter:		☐			

Add Group

Delete		Object	Field	Operator	Value
Add Condition					
☐		Application	Work Type	Equal (=)	Full Time
☐	AND	Application	Shift Type	Contains (IN)	Select / Day / Evening / Night / Rotating

-and-

Delete		Object	Field	Operator	Value
Add Condition					
☐		Supplemental Questions	Do you have the minimum	Equal (=)	Yes
☐	OR	Supplemental Questions	Do you have at least two	Equal (=)	Yes

Save

The second path that can be taken to create an Evaluation Step filter is directly from the Exam Plan Detail page. When you create an Evaluation Step filter from the Exam Plan Detail page, you're "planning ahead," creating a filter that will be used at a later time. The act of applying, or executing, the filter can only be done from the View Applicant by Step page.

- From the Exam Plan Detail page, Advanced Filters section, click Add Evaluation Step Filter.

- From here to the point of saving your Evaluation Step filter, it is the same process!

- Note that you can only apply your saved Evaluation Step filter from the View Applicants by Step page.

Eligible List Filters

Once some candidates move through all of your Evaluation Steps and on to the Eligible List, Eligible List Filters can then be utilized. Like Evaluation Step Filters, Eligible List Filters can be as simple or complex as you need and can span across multiple search elements.

Search elements for Eligible List Filters include:

- Applicant Master Profile
- Application
- Agency-Wide Questions
- [Job-Specific] Supplemental Questions

Add and Apply an Eligible List Filter

Once again, you have one of two paths to add an Eligible List Filter: from the Eligible Candidates page (while you're working with the candidate records), or from the Exam Plan Detail page (the main page for your Exam Plan record). Both paths lead to the final outcome of creating a new Eligible List Filter.

- From the Exam Plan Detail page, Eligible Lists section, click View Candidates for an eligible list containing candidate records that require some type of filtering.

- From the Select Action drop-down field, select Advanced Filter (Beta).

- From the Select Candidate(s) drop-down field, select the applicable candidate value base your filter upon (e.g., All Candidates).

- From here to the point of saving your Eligible List filter, it is the same process!

- Upon saving you are returned back to the page allowing you to apply, or execute your Eligible List filter; click Apply.

- Your Eligible Candidates page will display, Filter returned X records.

- After your candidate records are filtered, you're free to carry on with other tasks, e.g., reactive candidates, apply preference points, send notices, etc.

The second path that can be taken to create an Eligible List filter is from a directly from the Exam Plan Detail page.

- From the Exam Plan Detail page, Advanced Filters (Beta) section, click Add Eligible List Filter.

- From here to the point of saving your Eligible List filter, it is the same process!

- Note that you can only apply your saved Eligible List filter from the Eligible Candidates page.

Once you have saved your Evaluation Step and Eligible List filters, they display under the Advanced Filters section on the Exam Plan Detail page. From the Actions column you may View, Edit, Delete and Share/Un-share your filters.